



# INTRODUCING ORCID

## INTERACTING WITH ORCID - OVERVIEW

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Connecting Research  
and Researchers

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ORCID.org

# ORCID ENABLES



Organizations use the ORCID API to authenticate, collect, display, and connect persistent identifiers for people, places, and things in research workflows



# ORCID REGISTRY CONNECTIONS

Two Three models:

## 1. Connect via a vendor system

- Manuscript submission/publication
- Document/data repositories
- Profile systems
- CRIS systems

## 2. Develop a custom connection

- Update the registry yourself or
- Use DOI based auto-update

# THE ORCID API

API	Features
<b>Public API</b> Freely available to anyone	<ul style="list-style-type: none"><li>• <b>Authenticate:</b> Get a user's authenticated ORCID iD</li><li>• <b>Read (Public):</b> Search/retrieve public data</li><li>• <b>Create:</b> Facilitate creation of new ORCID records (via on-demand process)</li></ul>
<b>Member API</b> ORCID member organizations (Sandbox test environment freely available to anyone)	<ul style="list-style-type: none"><li>• <b>Read (Limited):</b> Search/retrieve limited-access data</li><li>• <b>Add:</b> Post new items to a record</li><li>• <b>Update:</b> Edit or delete items you previously added</li></ul>
<b>Premium Member API</b> Premium ORCID member organizations	<ul style="list-style-type: none"><li>• <b>Webhooks:</b> Receive notifications of updates</li><li>• Customised monthly reports (including email stats)</li><li>• Access to monthly public data file</li></ul>



# VENDOR CONNECTIONS

## Publishing

- eJournal Press
- Editorial Manager
- Open Journal Systems
- ScholarOne

## Document / data repositories

- DSpace
- ePrints
- Hydra/Fedora

## CRIS Systems

- Converis
- Elements
- IRMA
- Pivot
- PlumX
- Pure
- Vivo

Find more:

<https://members.orcid.org/orcid-enabled-systems>



# CUSTOM INTEGRATIONS

Via the ORCID API

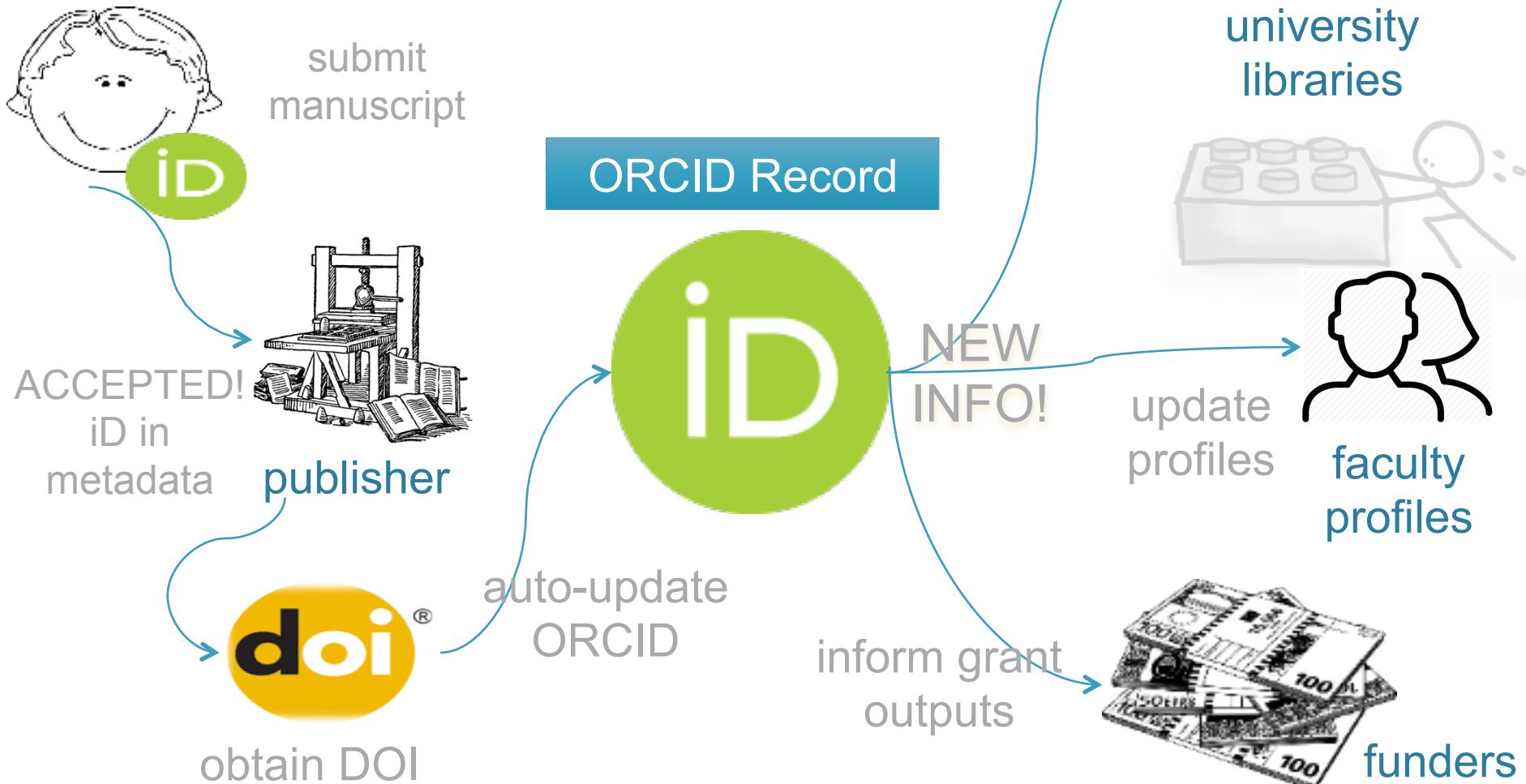
- Fine-tuned control and permissions
- Customized buttons, user flows, & user feedback
- Test and troubleshoot with ORCID Community Team

Case examples: <https://members.orcid.org/resources>

Code examples: <https://members.orcid.org/api/resources/code-examples>



# AUTO-UPDATE



# USER CONTROL: A KEY PRINCIPLE

**Researchers own their ORCID records. When using the API the researcher must be involved.**

- Only the researcher can create an ORCID record: you cannot create one on their behalf.
- The researcher must grant you permission to access/ update. If you need additional permissions, you will need to ask again.
- The researcher can revoke permissions granted.
- The researcher sets the visibility of all items of their record. If it's private, you can't read it – including email addresses. (In process: ability to request email access, even if private.)



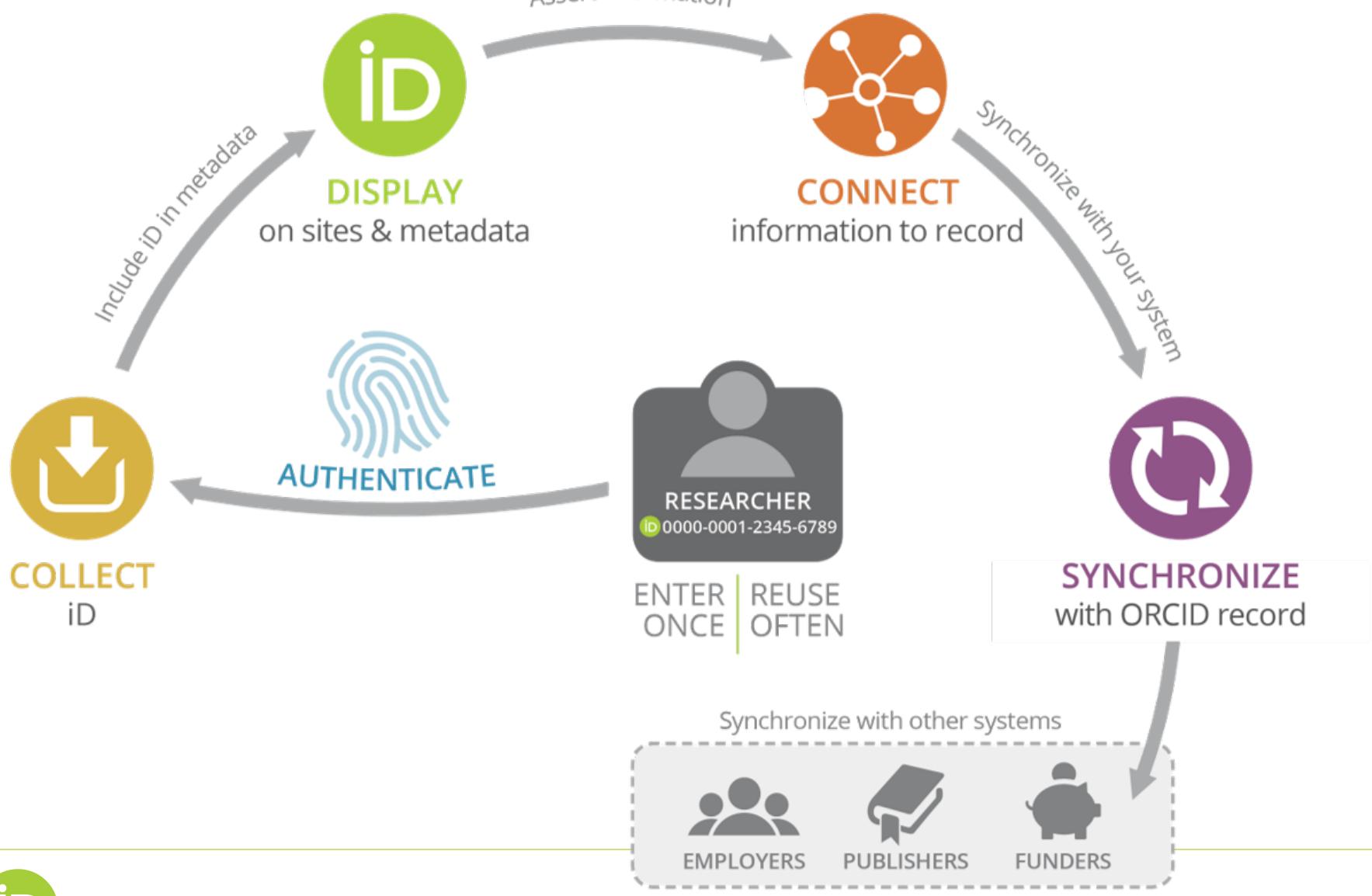
# THE ORCID API IN A NUTSHELL

- **Current version:** 2.0
- **Permissions / scopes:** your contract with the user
- **OAuth calls:** how you execute the contract
- **ORCID-specific calls:** to provide & receive information with the registry
- **The ORCID message:** format of the data exchanged
- **Permitted message format:** send: XML, JSON  
receive: XML, JSON, HTML, RDF, GZIP, Turtle

XSD: <https://github.com/ORCID/ORCID-Source/tree/master/orcid-model/src/main/resources>



# COLLECT & CONNECT



# COLLECT



*COLLECT validated ORCID iDs for individuals*

- Explain what ORCID is
- Explain why you're collecting iDs
- Consistent user experience
- Authenticated connections

Ensure individuals are correctly connected with your institution

Many vendor systems use the OAuth validation process

# DISPLAY



DISPLAY iDs on your website, platform, systems

- iDs shown as a link
- iDs in metadata
- Use the ORCID Member logo
- Explain why iDs are collected

Signal to your researchers and the wider community that your systems are plumbed to support ORCID iDs

<https://orcid.org/trademark-and-id-display-guidelines>



# CONNECT



CONNECT your data to ORCID records

- Request permission to write to records
- Store long-lived tokens
- Add data that you uniquely can assert
- Explain the connection

Enable researchers to provide validated data to other systems they use

<https://orcid.org/blog/2015/10/26/auto-update-has-arrived-orcid-records-move-next-level>

# SYNCHRONIZE



SYNCHRONIZE with your systems

- Update information when it changes
- Auto-add new information
- Search & link wizards
- Sync data from others

Saved time, better reporting, improved information flow

<https://members.orcid.org/api/tutorial-webhooks>

<https://orcid.org/blog/2015/10/26/auto-update-has-arrived-orcid-records-move-next-level>